

Skype for Business

User Guide



University of
St Andrews

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What is Skype for Business (Skype-fB)?

This guide is for people who are new to Skype-fB, and provides information on how to begin using it to communicate with your colleagues. Skype-fB was formerly known as Lync but was re-branded under the current release name after Microsoft acquired Skype. It is a communications platform that allows you to interact with your contacts using **instant messaging (IM), audio and video conversations**, and **Skype-fB Meetings**. It runs on Windows and Mac operating systems, and on mobile devices.

For a full range of feature and training videos see [Microsoft's Discover Skype for Business](#) site.

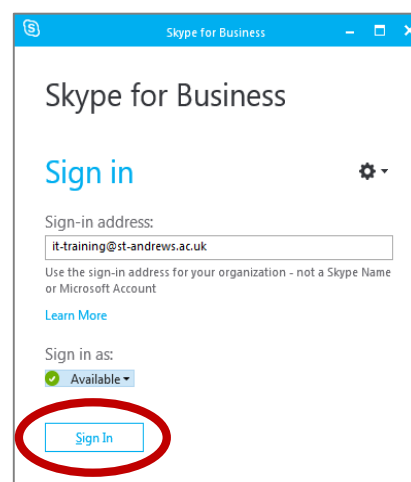
Accessing Skype for Business

Starting Skype for Business on your desktop

Windows:

The Skype-fB Windows client is installed by default on the University's standard desktops as part of the Office 2013 suite.

- Click the **Windows start** button at the bottom left of your screen
- Select **All Programs > Microsoft Office 2013 > Skype for Business 2015** (yes, 2015)
- When the Skype-fB window appears, enter your **Sign-in address** in the format **username@st-andrews.ac.uk**, then click the **Sign In** button. It will then request your password. Enter your university network password.



Mac OS:

To use Skype for Business (Lync) for Mac 2011 you need to download and install the client program and then manually configure the settings. The download and all the instructions can be found in the Office 365 web portal, on the Software page as follows:

- Log in to the Office 365 portal <https://portal.office.com/> : and go to **Settings** (cog icon) > **Office 365 settings** > **Software** > **Skype for Business**
- Click the Install button; save the .dmg file, open it (if your security settings won't allow it to be launched by clicking, hold down the CTRL button and click the file, select 'Open' from the Finder menu) and follow the installation instructions.
- Follow steps 2 & 3 on the Software page to apply the update and configure the server settings.

To start after installation:

- From the Finder menu bar, select **Go > Applications > Microsoft Lync**
- In the Lync window, enter the same data in both the **Email address** and **User ID** field in the format **username@st-andrews.ac.uk**; enter the password that you use to log in to a university networked computer, then click the **Sign In** button.



Subsequent access to Skype for Business

Once you have installed Skype-fB on your desktop and signed into it for the first time, it will automatically log you in and open the main Skype-fB window every time you start up your computer. If you disable this preference (see **Options** below), you can start it manually when required.



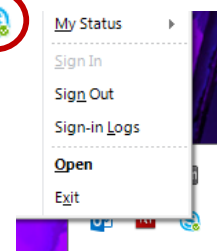
To open Skype-fB manually, find it in the main Office program list:

Start > Programs > Microsoft Office 2013 (or pin it to the taskbar for easy access).

When Skype-fB is running, you will see a large Skype-fB icon on the Windows taskbar, and a small Skype-fB icon in the system tray at the end of the task bar.



Closing the Skype-fB window does not close the application, but merely minimises the window, which can then be opened by clicking the large taskbar icon. The small system tray icon only provides access to a few select commands, and doesn't open the Skype-fB window, but you can right-click it to quickly update your status and exit Skype-fB.



Changing Skype for Business startup behaviour

You can change your default Skype-fB startup options using the **Options menu** (cog icon) on the main screen, then choosing **Tools > Options**. Once the **Options** window opens, select **Personal** from the left-hand panel, then make the required changes, such as listed in the *Options* menu below.

Skype for Business basics

The main Skype-fB window

When you open Skype-fB, the main Skype-fB window will appear:

A screenshot of the Skype for Business main window. The window title is 'Skype for Business'. The top bar shows 'What's happening today?' and a search bar. Below this is a header for the contact 'it-training@st-andrews.ac.uk' with status 'Available' and a location dropdown. A toolbar contains icons for profile, clock, calendar, and settings (cog icon). The main area has tabs for 'GROUPS', 'STATUS', 'RELATIONSHIPS', and 'NEW'. Under 'RELATIONSHIPS', there are sections for 'FAVORITES' and 'OTHER CONTACTS (0/0)'. A large empty area at the bottom is for adding contacts. Red boxes and lines highlight specific features, each with a text box explaining them.

Your status information
If you have uploaded a profile picture, it will appear here with the coloured icon indicating your availability. Enter text in the box above it to let others know what you're up to, change your availability using the drop-down menu, or add your location.

Tools and communication
- Contacts
- Conversations
- Meetings

Options menu
Close, sign out or exit from Lync. Change settings for:
- Login
- Contact display
- Your status
- Showing/hiding your picture
- Audio and video devices

Main viewing and interaction area changes depending on the tool you are using. Here, Contacts options are showing.

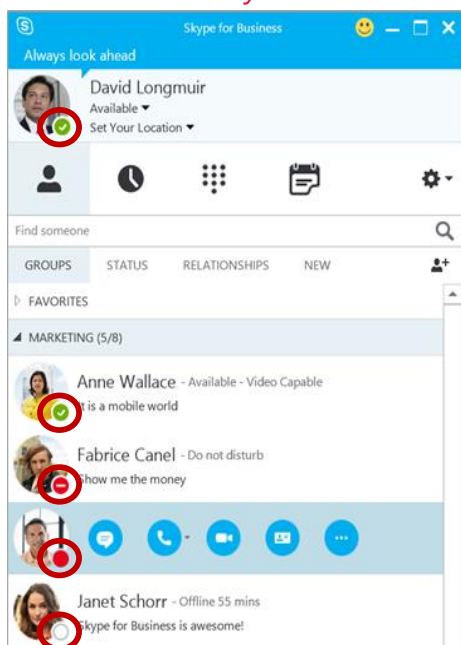
Adding a profile picture

If you have previously uploaded a profile picture to Office 365 through the main portal, it will automatically carry through to Skype-fB.

To upload or edit your picture from within Skype-fB:

- Click **Options** (cog icon) on the Skype-fB main window.
- Choose **Tools > Options**.
- In the **Skype-fB Options** window, select **My Picture** from the left-hand panel.
- Click the **Edit or Remove Picture** button to upload an image. Office 365 will open.
- Browse to select your picture file, then click **Save** at the bottom right of the screen.
- You will be returned to the Skype-fB Options window. Ensure that the **Show my picture** radio button is selected.
- Click **OK**.

User Availability: Presence

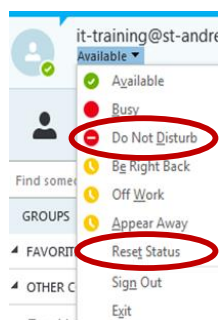


A user's availability is indicated by the coloured icon beside their profile picture. This availability status is known as your **presence** and will indicate a status such as *Available*, *Busy*, *Away*, *Do Not Disturb*, etc. Your presence indicator will effect which communication options are available. Presence is only indicated for those with the Skype-fB client running, otherwise it will show as *Offline* (uncoloured). Indicators are based on your Outlook calendar information, but update according to both your calendar and your activity.

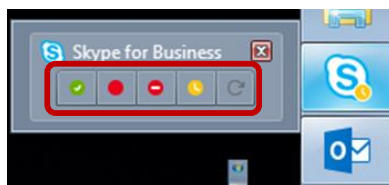
For instance, if you are available at your desk but don't use your mouse or keypad for a period of time (the default is five minutes, but this can be changed), Skype-fB automatically changes your presence indicator from green to an inactive yellow icon. Using your keyboard or mouse returns your status to available.

You can also manually change your availability by:

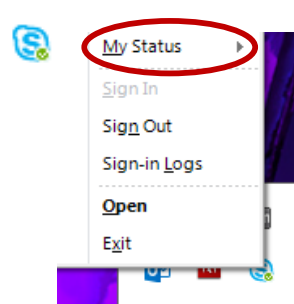
Using the drop-down status menu in the Skype-fB window



Hovering over the large icon on the task bar

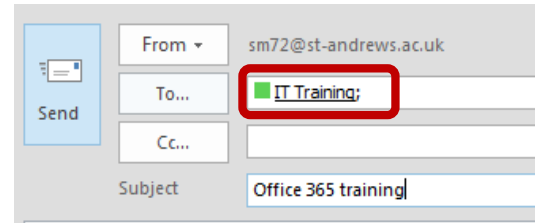


Right-clicking the small icon on taskbar



Manual status settings override all automatic changes. To return to automatic settings, select **Reset Status** from the status drop-down menu.


As Skype-fB is integrated with Outlook, you will automatically see the availability of colleagues when you communicate with them by email. When you append a name to the address field in a new email you will also see their presence status displayed beside the name.

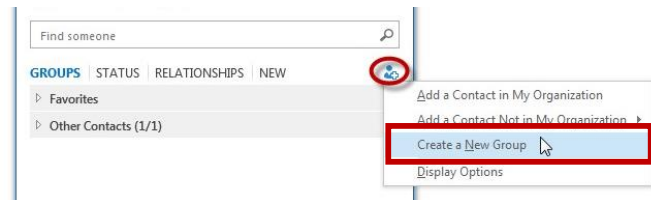


Contacts

When you first start using Skype-fB, it is worth investing some time setting up contacts and groups so that you can easily communicate with people that you frequently interact with.


Creating a group

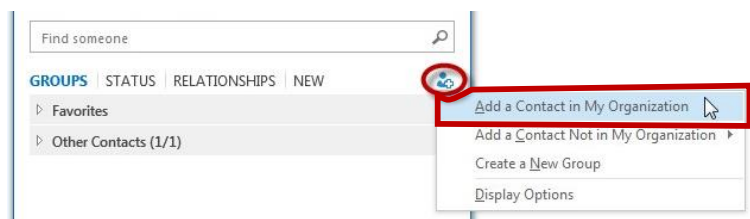
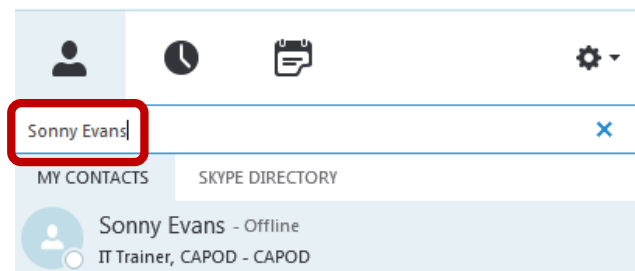
- In the main Skype-fB window, click the **Add a Contact** icon , then choose **Create a New Group**
- Alternatively, right-click any group name in your contacts list (e.g. Other Contacts), and then click **Create New Group**.
- A **New Group** box will appear. Rename it by overwriting the text so that the new name is meaningful to you.
- Your group has been created, and you can start adding contacts to it.



Finding and adding contacts

From the University Directory

- In the main Skype-fB window start typing the name in the search box.
- A list of matching people from your Contacts will appear.
- Right-click on the required name and select **Add to Contacts List**, which then gives options of adding to a specific group.
- You can also add contacts from the Add a Contact icon , then choose **Add a Contact in My Organisation**.



From the Skype Directory

You can also add contacts worldwide from Skype. Type either the person's name or (if you know it) their Skype name in the search field, but this time selecting the **Skype Directory** tab. A list of Skype users will appear. Add them to your Contacts as in the method for local contacts.

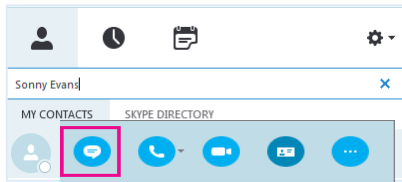
Controlling Privacy Relationships

This setting controls the connectivity and the type of information that can be viewed by your contacts. If you want to view or change the privacy relationship with a contact, right-click the contact's listing, and then click **Change Privacy Relationship**. You may also use this setting to block a contact.

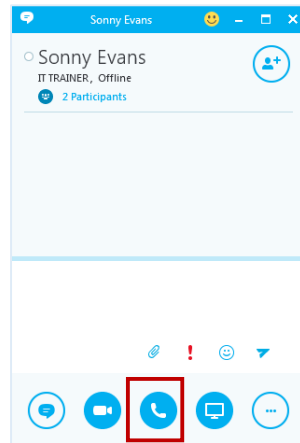
Communicating with your contacts

To communicate with a contact, use one of the following methods to access the communication tools, then select the option you want to use (e.g. instant message, video call, etc).

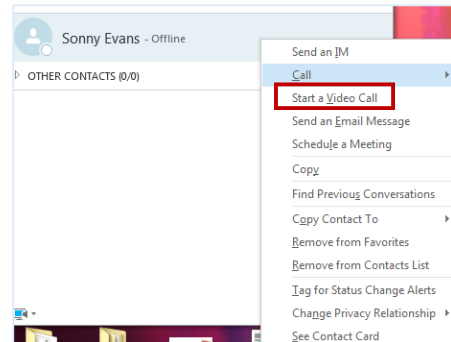
Hover your mouse over their picture in the contacts list:



Double-click anywhere on their contact listing:




Right-click their contact listing:

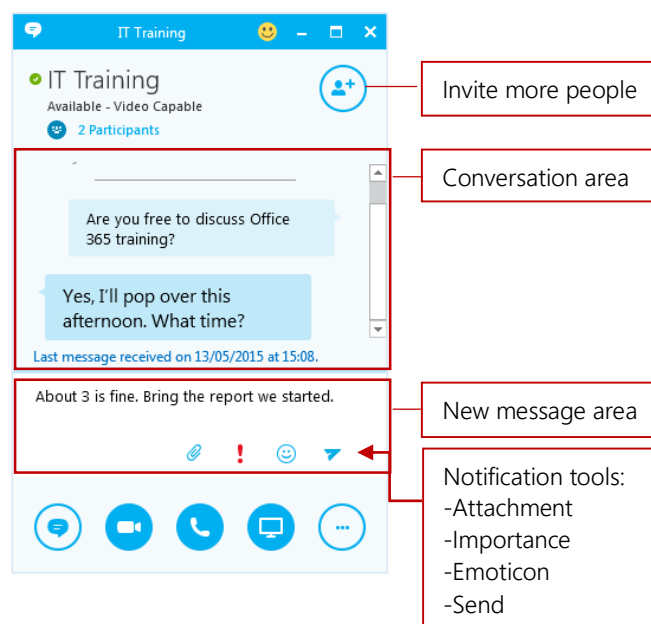


Instant messaging (IM)

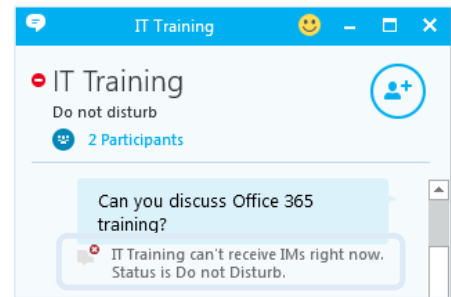
Instant messaging (IM) allows you to communicate with people in real time, and on a moment's notice. It is less formal than email, and faster than a phone call. You can have an IM conversation with one or many people, send pictures and files or add audio or video.

Starting an IM conversation with one person

- Locate the person you want to send an instant message to.
- Display the communication options for that person using one of the above methods; choose the instant messaging icon.  A conversation window will appear.
- Type your message at bottom of the conversation window and press the return key or click the send icon (>). Your conversation appears at the top of the conversation window. You can also click options to add an attachment, emoticons, or mark the message as important.



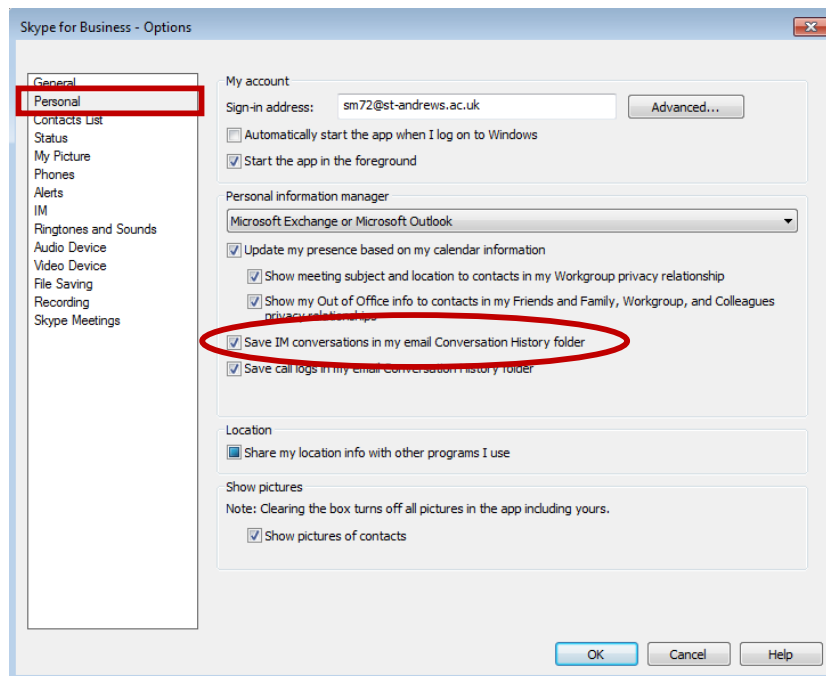
- If a person's status is set to *Do Not Disturb*, your message will not be sent. Get a notification when someone's status returns to *Available* by tagging the contact. Right-click on their contact name and select **Tag for Status Change Alerts**



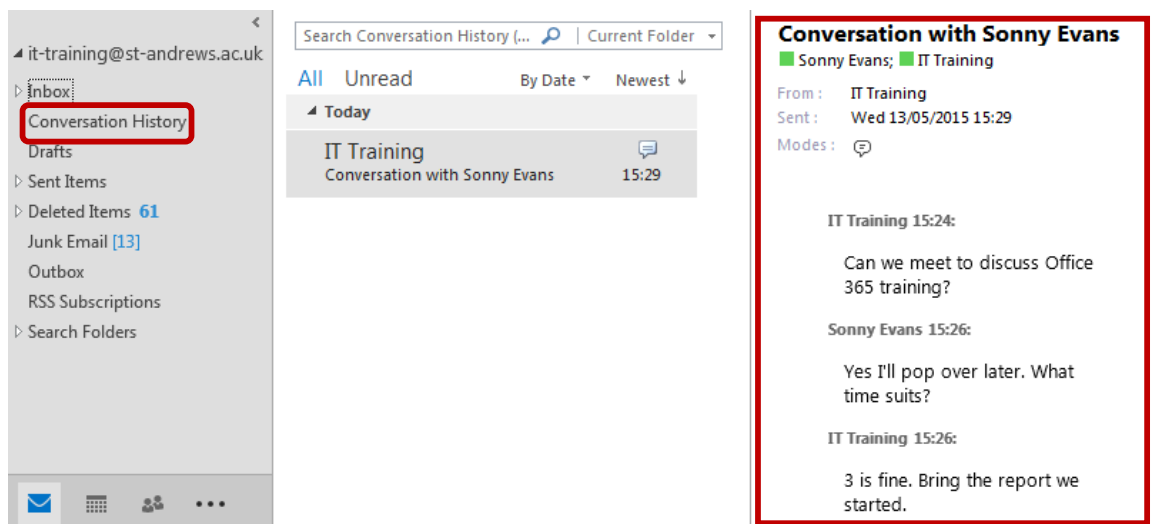
Conversation History

IM conversations are not saved by default. However this feature can be enabled so that you may save all conversations to an email folder in Outlook. To save IM conversations:

- In the main Skype-fB window click on **Settings (cog icon) > Tools > Options**.
- In the **Options** window list on the left, select **Personal**.
- Tick to enable the option **Save IM conversations in my email Conversation History folder**



- IM conversations will now be saved in Outlook in a folder labelled **Conversation History**.



Holding an IM conversation with more than one person

If you have already started an IM conversation, you can add others to it by dragging their picture from your contacts list into the conversation window or if they are not in your list click, the **Invite More People** button at the top of the conversation window to bring up the directory.

If you want to start a new IM conversation with a group that you have already set up, right-click the group name in your contacts list and click **Send an Instant Message** to start the conversation. Your message will go to all group members.

To start a new IM conversation with contacts that aren't in a group, go to your contacts list and hold the **Ctrl** key while you click each contact. When you have selected all the required contacts, right-click and select **Send an IM** to start a multi-way conversation.

Sending a file or image using IM

To send a file or image from an IM conversation, either:

- Drag-and-drop a saved file into the text input area;
- Use the attachment option (paper-clip icon) in the message window; or
- Copy and paste a saved file or image from an Office program into the text input area.

Responding to an IM alert



When someone starts a new IM conversation with you, an alert pops up on your screen.

To see the message, click anywhere on the photo area to accept it. The IM conversation window will open to display the message.

To reject the message, click **Ignore**. The message goes to your Outlook Inbox.

If you do not want to receive new IM alerts, set your presence status to **Do Not Disturb**. You can do this using the **Options** menu on the alert box, or by returning to the main Skype-fB window and changing your status there.

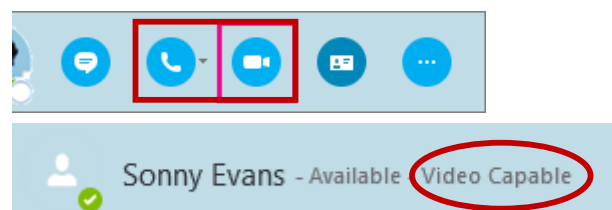
Making an audio or video call

If you have a microphone, a headset (or speakers) and a webcam attached to your computer, you can use Skype-fB to make and receive audio and video calls.

Skype-fB automatically detects your audio and video devices, but before making an audio or video call you should check that they are set up correctly. To do this, click the **Options** menu (cog icon) in the main Skype-fB window, then choose **Tools > Audio (or Video) Device Settings**.

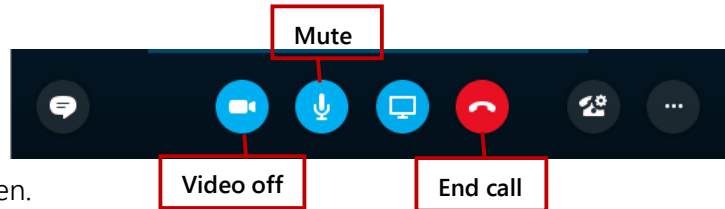
To make a call, locate your contact in Skype-fB, then click the audio or video icon.

Contacts who have a webcam set up, and so can accept video calls, have 'Video Capable' on their contact details.



When you call a contact, an alert pops up on their screen which they can accept by clicking anywhere in the photo area, or choose to reject the call.

Once in progress, you can control the call by putting it on hold, muting your audio, switching between audio devices, and changing the way the video appears on screen.



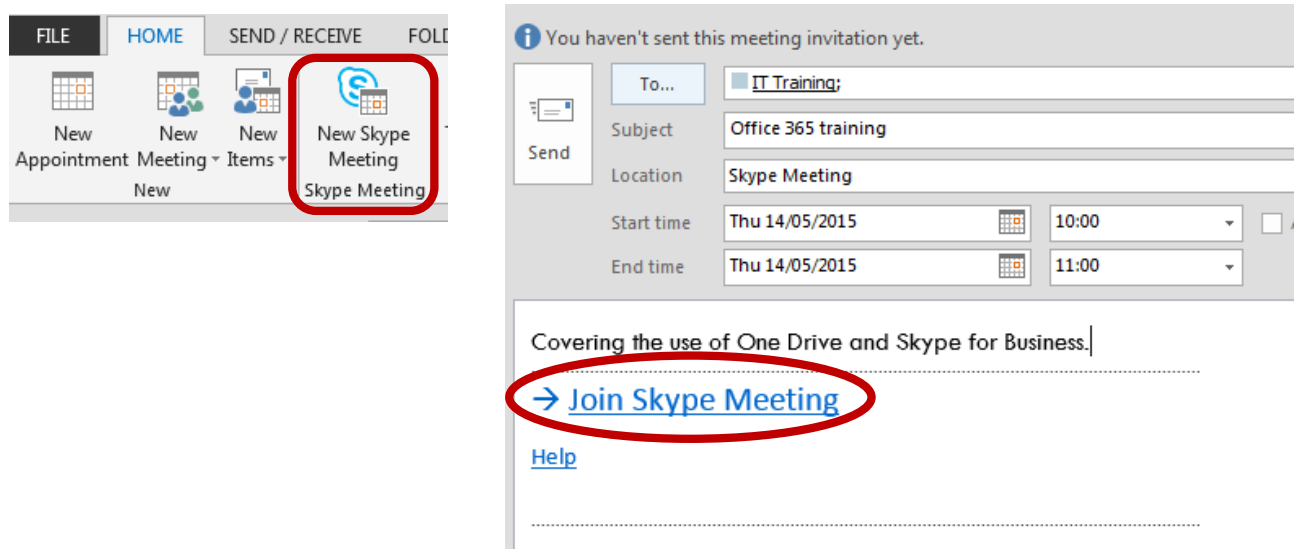
To end the call, close the window or click the **End call** button.

Skype for Business meetings

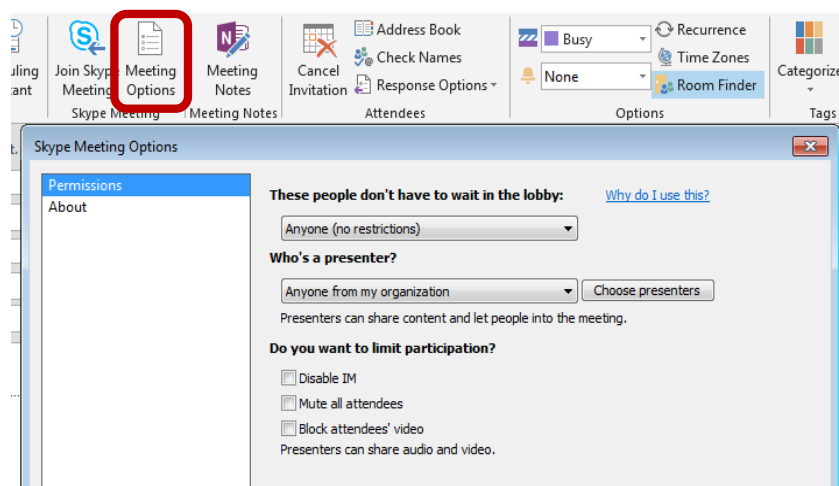
The meeting feature gives you the capability to collaborate by making presentations online and sharing desktops, programs, files and a whiteboard between meeting participants.

Scheduling a meeting

If you use the Outlook desktop client or Outlook 365 online, you can use **Skype-fB Meeting** to schedule a single or recurring online meeting similar to the way you use Outlook to schedule regular meetings. To initiate an online meeting request in the desktop client, start as you would normally by going to your Outlook calendar. Click the **New Skype Meeting** button on the ribbon and in the meeting request window enter the attendee and date/time data as for a standard meeting. A link is automatically added to your meeting request that invitees can click to join the conversation.



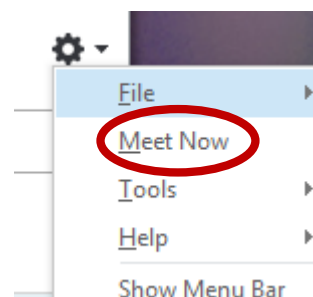
With the meeting request created, you then have access to the **Meeting Options** button on the ribbon where you can set preferences and permissions.



Starting an unscheduled meeting

For spontaneous meetings, the **Meet Now** feature in Skype-fB allows you to hold impromptu meetings without the need to schedule in Outlook.

- In the Skype-fB window, go to the **Options** menu (cog icon) and select **Meet Now**.
- A meeting conversation window will open and you will be able to invite participants using the **Invite** button



Sharing your desktop and other content

You can share content with colleagues either from the messaging conversation window or during a meeting. This presentable content can include your computer desktop, a single program file or a PowerPoint slideshow. You can also share a virtual whiteboard, conduct polls and hold a Q&A session.

NOTE: When you share your desktop, everyone participating can see your entire desktop including notifications. If you have confidential information or documents that you don't want people to see, close them or use program sharing instead.

Start sharing

Start sharing by first establishing a connection to your contacts by starting an IM conversation, audio/video call or a meeting.

To share your screen, click the **Present Icon** from within a conversation or meeting window. From the content options menu:

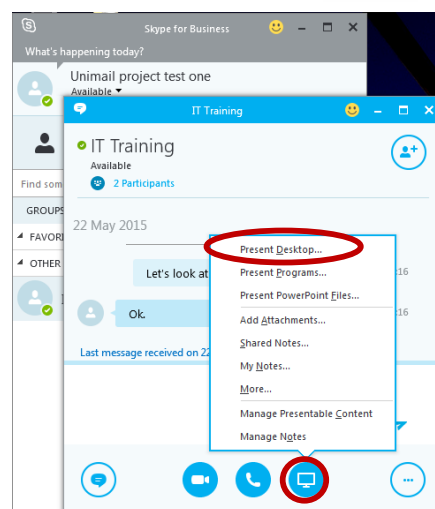


- Click **Present Desktop** to show the entire contents of your desktop. If you have a dual-monitor setup, you can choose to select all monitors, the primary monitor only, or the secondary monitor.
or...
- Click **Present Programs** and double-click the program window you want to share (the program for sharing must already be open).

When you share a program file or desktop, the window will have a yellow border and a **Now Presenting** tab will display on your desktop. Your presence status will also automatically change to *Presentation*, and will thus restrict other Skype-fB alerts appearing.

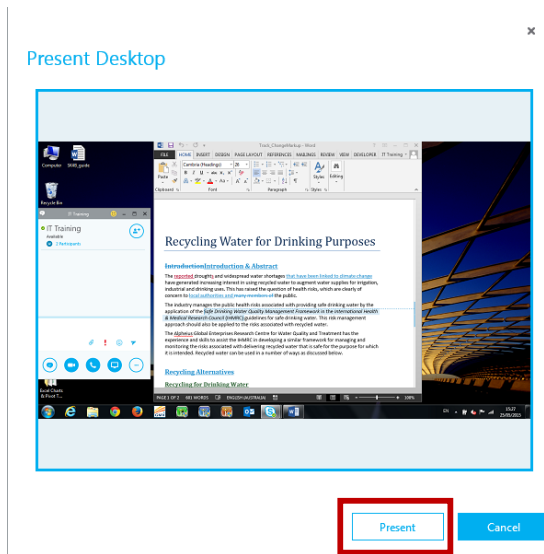
Your participants will receive an alert to notify them that you are sharing content. Once they click accept, the shared content will appear in a window on their screen.

Initially, only the person who started presenting can control the content. You can however, allow any participant to share control. You can take back full control at any time. See the later section on allowing participants to control content for more details.



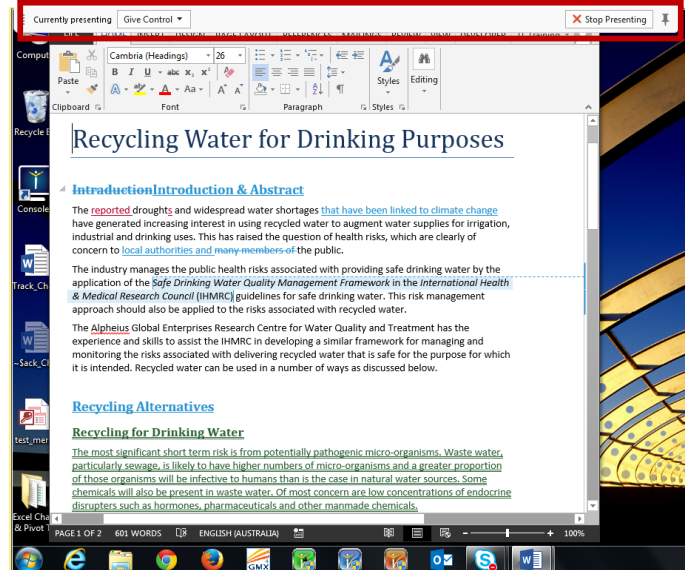
What the presenter sees:

Initiating the content share



Click the **Present** button to send a sharing request to your participants.

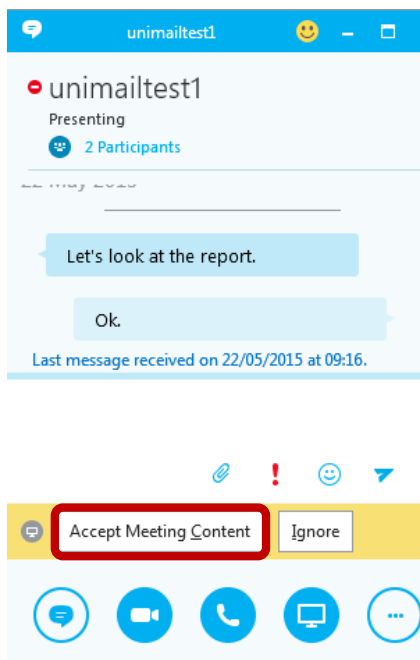
With sharing established



The **Sharing toolbar** for sharing control with other participants appears at the top. The yellow border around the desktop indicates the extent of what other participants can see.

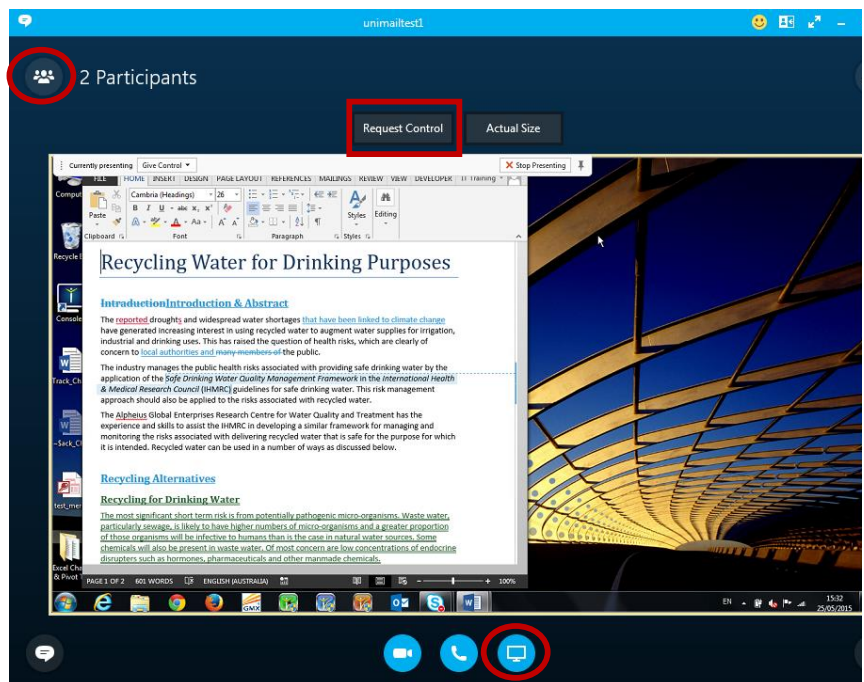
What the participant sees:

An invite to share alert appears either on the desktop or, if open, in the message window.



Click **Accept** or on the picture area in the desktop alert.

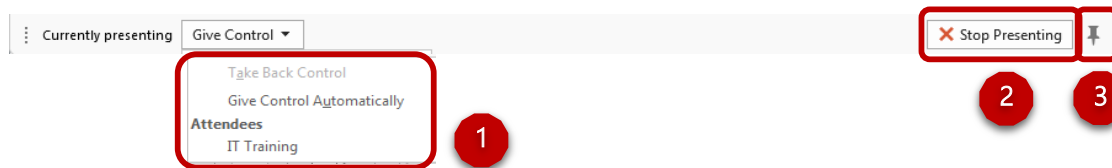
Once accepted, the participant will see this sharing stage, where they can click buttons to request control or other options such as inviting more participants or sharing their own content.



To stop sharing the content, close the stage window.

Allowing participants to control content

On the sharing toolbar at the top of the presenter's screen, use any of these options:



- 1 Click **Give Control** to share control of your desktop or programs with the specific participants. (**Control Automatically** gives access to anyone automatically who requests control of your desktop; recommended only for small meetings)
To revoke control rights, select **Take Back Control**. Alternatively, hit the **Ctrl + Alt + Space**
- 2 Click **Stop Presenting** when you are done sharing your screen.
- 3 Click the pin to hide the toolbar and have more space. To unhide the toolbar, move the mouse to the top of the screen.

Exiting Skype for Business

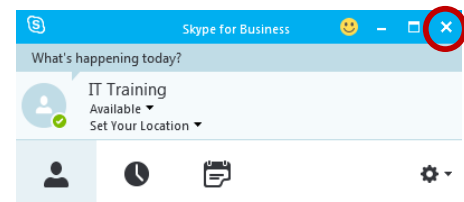
When you have finished using Skype-fB, you can either

1) **close** the Skype-fB window, 2) **sign out** of your session or 3) **exit** from the program. The differences are summarised here:

Option	Is Skype-fB running?	Can others see your status?
Close	Yes	Yes
Sign out	Yes	No
Exit	No	No

Closing the Skype for Business window

You can close the Skype-fB window by clicking the **X** in its upper-right corner. Although the window closes, your session continues to run, so others can still see your availability status and you still receive alerts.



The Skype-fB icons on your taskbar will appear as they do when you have the Skype-fB window open, indicating your presence status. Re-open the Skype-fB window at any time by clicking the large icon in the program section of the taskbar.



Sign out

Sign out closes your Skype-fB session, but continues to run Skype-fB in the background, making it easier to sign in again when you're ready. The Sign out option is available from your status drop-down in the main Skype-fB window or by right-clicking the small icon in the system tray at the end of the taskbar. Once you have signed out in this way, others cannot see your status or interact with you. Skype-fB icons on your taskbar appear with crosses:



Exit

Exit closes your Skype-fB session and stops Skype-fB running on your computer. Both icons will disappear from the taskbar at the bottom of your screen. After exiting, use the **Windows start** menu if you want to restart Skype-fB (pin it to the task bar for easy access).